



# **Student Financial Assistance**

## **Content Management**

### **Interwoven Configuration**



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## **1. Executive Summary**

The purpose of this document is to provide SFA with a description of how Interwoven has been configured. This document includes a list of files on the Interwoven server that have been added or modified in order to customize the application to SFA's user requirements.

## **2. Overview**

Interwoven's TeamSite application allows multiple users to contribute web content and deploy that content (files or database records) to a production environment. The application enables each contributor to work in their own independent workarea on an independent virtual website. This allows each developer to test how their changes will reflect on the complete website.

TeamSite templates for content creation allow members of the organization without strong backgrounds in html development to contribute to the website. Users can enter metadata and content through custom designed data capture templates. The data is merged with a presentation layer to create html pages that integrate into the existing website.

Deployment of the content assets are handled by two different modules of TeamSite, OpenDeploy and DataDeploy. OpenDeploy transfers file assets to the appropriate locations from the Content Management server to the appropriate production web server. DataDeploy uses the data captured by the templating process and creates appropriate entries in a database. Both modules are transactional such that if the process is not fully completed, each environment is rolled back to its original state. This insures against an incomplete and possibly incorrect deployment scenario

## **3. Scope**

TeamSite supports three different applications in the integrated technical architecture, Information for Financial Aid Professionals (IFAP), Schools Portal (SP), and the SFA Intranet Release 2 (SFANet). The following diagram shows the areas that the content management system covers.



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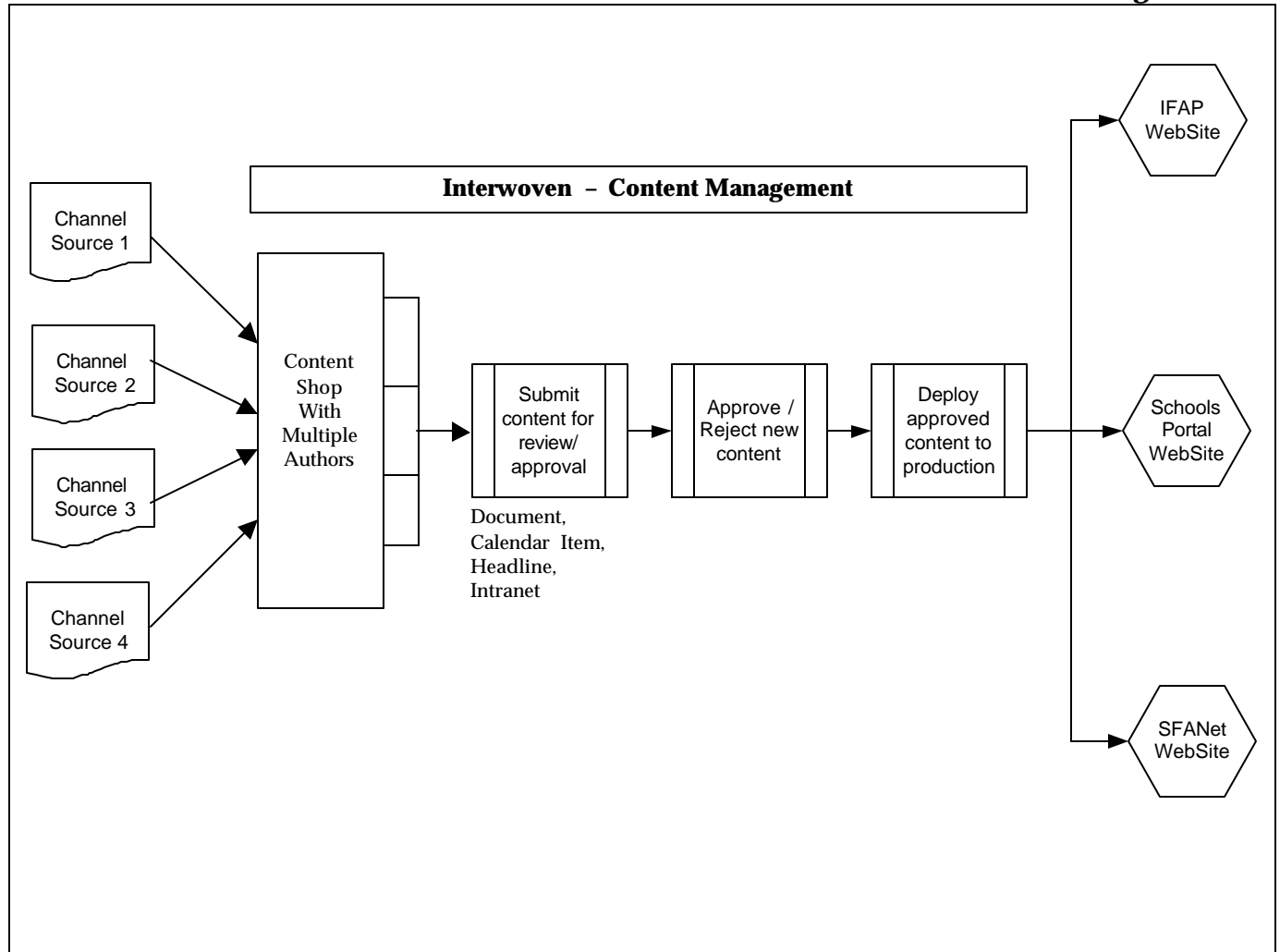


Figure A. Content Management Scope

The original design requirements of the Content Management system were to provide all classic CM functionalities such as version control, check-in check-out, and scalability. Along with these functionalities the system needed to be usable by members of the organization that are not skilled in HTML development. This led to the use of TeamSite templating for page creation and site management for the IFAP and SP applications. Thus the software has been configured such that a user with limited or no HTML development skills can contribute publications, headlines, calendar events, and manage the links listed on the Portal home page via TeamSite.

The SFA Intranet content will be managed using TeamSite. This includes all index pages, server side includes, pdf attachments, and servlets. This does not include any Autonomy related scripts or configuration files. Change requests will be forward to the content shop through their previously used channels. The shop will now be enabled with version



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control, and extensible development environment, and the ability to promote content to the production environment without having go through the CIO organization.

## 4. Configuration

### 4.1 Content Load

#### IFAP/SP

No publications that were stored in the previous Lotus Notes IFAP database were imported into TeamSite. These documents will only be managed by the new CM system if updates to those documents are necessary.

#### SFANet

Content from two sources will be merged for the production ready content load of the SFANet. Updates from the existing HP platform will be merged with code fixes from the search enabled staging environment at the VDC integrated technical architecture development environment. Code changes in the development environment and content updates on the old platform will be tracked by the respective developers. The result of the content merge will be the most current content combined with the code changes necessary to enable search capability.

### 4.2 Templating

Template categories and types are registered in the templating.cfg file. All template files are located under the following directory structure in each workarea of the ifap production branch.

Table 1. Templating Files

| Directory   | Files            |
|---|------------------|
| /iw-home/local/config                             | templating.cfg   |
| /templatedata/category/template name              | datacapture.cfg  |
| /templatedata/category/template name/presentation | presentation.tpl |

#### IFAP/SP

Thirty-nine total templates are loaded under the ifap main TeamSite branch. The templates are broken into three separate categories, ifap, loan, and sp. Ifap and loan categories hold



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sections of the thirty-five ifap publication templates. Direct loan publications were split into their own group instead of being incorporated into the ifap to mark their commonality. Each template is a combination of two files, one datacapture.cfg file and one presentation template. Template naming conventions were taken from the abbreviated publication type names used by the ifap database. The list below outlines each template category and name.

Table 2. IFAP/SP Templates

| <b>Publication Name</b>                       | <b>Category</b> | <b>Template Name</b> |
|---|-----------------|----------------------|
| Accrediting Agency                            | ifap            | aagencies            |
| Audit Guides                                  | ifap            | aguides              |
| Blue Books                                    | ifap            | bbooks               |
| Campus-Based Program Materials                | ifap            | cbpmaterials         |
| Conferences and Presentations                 | ifap            | presentations        |
| Counselor's Handbooks                         | ifap            | chandbooks           |
| Dear Partner, Colleague Letters               | ifap            | dpcletters           |
| Default Rate Materials                        | ifap            | drmaterails          |
| Direct Loan Bulletins                         | loan            | dlbulletins          |
| Direct Loan Fact Sheets                       | loan            | dlfsheets            |
| Direct Loan Newsletters                       | loan            | dlnewsletters        |
| Direct Loan Pamphlets                         | loan            | dlpamphlets          |
| Direct Loan School Guides                     | loan            | dlsguides            |
| Direct Loan Technical Reference               | loan            | dlreference          |
| Draft SFA Publications For Review and Comment | ifap            | draftsfapubs         |
| EDConnect for windows users' guide            | ifap            | edconnectwug         |
| EDE Technical References                      | ifap            | edereferences        |
| EFC Formula Information                       | ifap            | efcinformation       |
| Electronic Announcements                      | ifap            | eannouncements       |
| FAFSAs and Renewal FAFSAs                     | ifap            | fafsa                |
| Federal Registers                             | ifap            | fregisters           |
| FFEL Special Allowance Rates                  | ifap            | ffelspecrates        |
| FFEL Variable Interest Rates                  | ifap            | ffelvarrates         |

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|                                    |      |                 |
|------------------------------------|------|-----------------|
| FWS Resource Guide                 | ifap | fwsguide        |
| IPOS Program Review Guidance       | ifap | iposguidance    |
| NSLDS Reference Materials          | ifap | nsldsmaterials  |
| Pell Grant (RFMS) Process          | ifap | pgrfmsprocess   |
| Policy Bulletins                   | ifap | pbulletins      |
| Reauthorization                    | ifap | reauthorization |
| Regulations Compilations           | ifap | regcomps        |
| SAR and ISIR Reference Materials   | ifap | sarmaterials    |
| SFA Training Depot                 | ifap | sfadepot        |
| SSCR User's Guides                 | ifap | sscrguides      |
| Student Financial Aid Handbooks    | ifap | sfahandbooks    |
| Verification Guides and Worksheets | ifap | vgworksheet     |
| Schools Portal Calendar Record     | sp   | calendar        |
| Schools Portal NPRM Record         | sp   | nprm            |
| Schools Portal Headline Record     | sp   | headline        |
| Schools Portal Link Frame          | sp   | sfalinks        |

**SFANet**

Four templates were designed for the SFANet. The templates were designed to create the four pages under of the SFA Communications section within the intranet. Templates for this section will allow a user to upload the new communication announcement (Fact/Info sheet, Press Release, etc.) to the TeamSite server and add a link to new document from the appropriate communications page without directly editing the page html source code.

The following table lists the TeamSite Templates for the SFANet.

Table 3. SFANet Templates

| <b>Document Name</b>                  | <b>Category</b> | <b>Template Name</b> |
|---------------------------------------|-----------------|----------------------|
| SFA Communications – Press Releases   | int             | press                |
| SFA Communications – Fact/Info Sheets | int             | factinfo             |
| SFA Communications – Inside SFA       | int             | insidesfa            |



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|  |     |       |
|--|-----|-------|
| SFA Communications – Transformation News | int | trans |
|--|-----|-------|

### 4.3 Workflow

Workflow originally designed under the 9.3.3 deliverable, Detailed Content Management Processes, have been scaled down due to the lower number of TeamSite users than in the original scope. The single and double approval workflows are available for utilization by the TeamSite users. Reference deliverable 9.3.3 for a description of the workflows.

The following table lists the directories and files associated with the custom workflows designed for all three applications being supported by the Content Management system.

Table 4. Workflow Files

| Directory                 | Files                                      |
|---------------------------|--|
| /iw-home/local/config     | available_templates.ipl                    |
| /iw-home/local/config/wft | single_approval.wft<br>double_approval.wft |

### 4.4 Deployment

#### IFAP/SP

HTML files and database content are deployed from the Content Management server (su35e4) to the web servers (su35e8, su35e10, and su35e12) and one database server (hvp2) respectively. Deployment is of the entire content set and is no more granular than IFAP or SP. Invoking deployments are user driven and not performed on a scheduled basis by the system.

IFAP content is swept from the staging area of the ifap production branch to the corresponding file directories on the web servers, su35e10 & su35e12, and database tables within the production environment.

SP content is swept from the staging area of the ifap production branch to the corresponding file directories on the web server, su35e8. Database content is deployed to database server hvp2 to the ifap database. A trigger then updates the appropriate tables in the vic database for the schools portal application.





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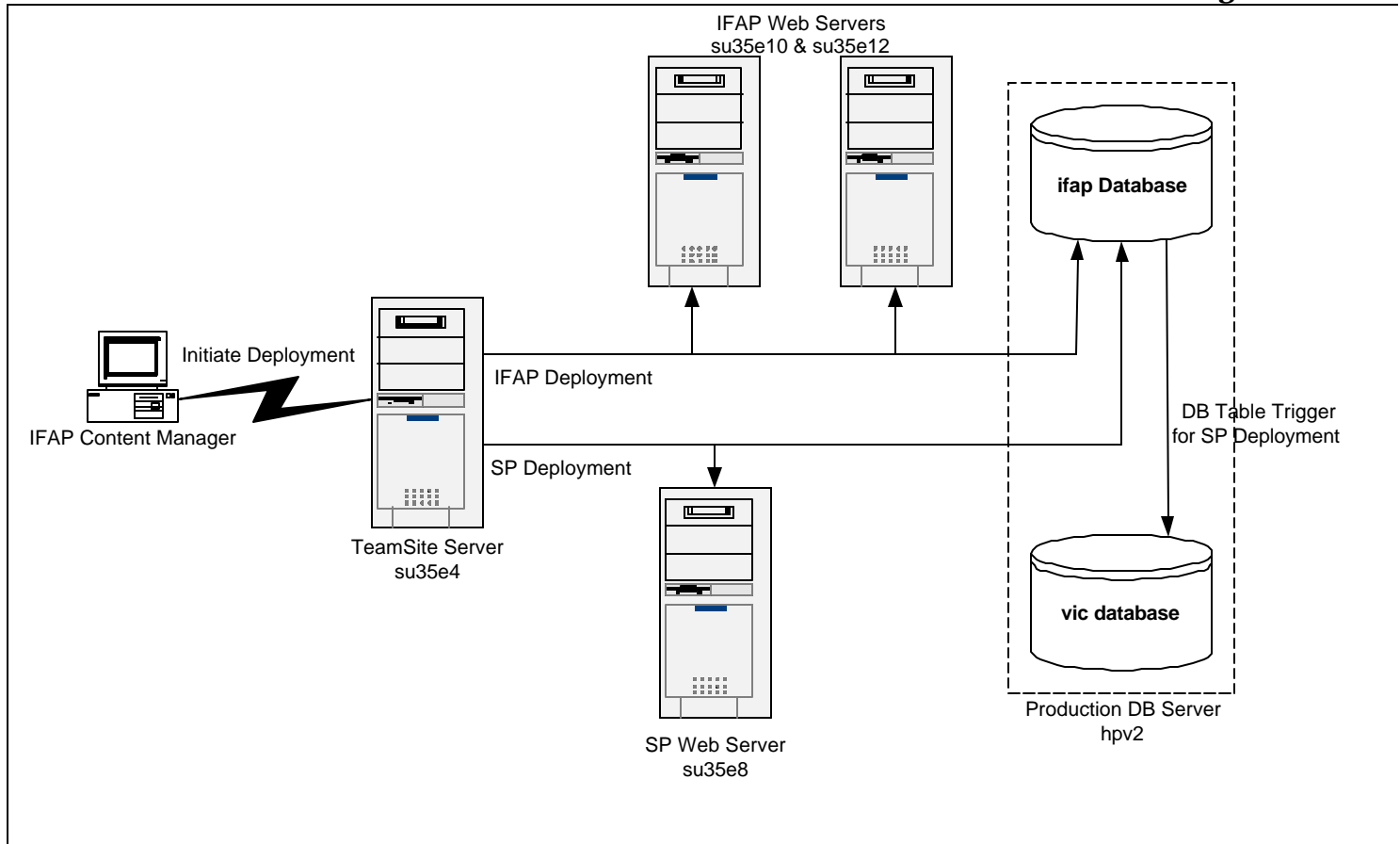


Figure B. IFAP/SP Deployment Scenario

The following configuration files have been installed on the TeamSite server, su35e4. Opendeploy configuration files must also reside on the target servers. File location and names are listed in the table below.

Table 5. IFAP/SP Deployment Config Files

| TeamSite Server Directory | File Name   |
|---------------------------|---|
| /iw-home/opendeploy/conf  | dd.sp.prod.cfg<br>dd.ifap.prod.cfg<br>od.prod.cfg |
| Target Server Directory   | File Name   |
| /opt/od/conf              | iw.odserver.cfg                                   |



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HTML files are deployed from the Content Management server to the production SFANet web server, su35e14. Assets are swept from the staging area of the int branch to the corresponding environment on the receiving server. Deployment is of the entire intranet code set. The user initiates deployments from the TeamSite GUI. No automatic deployments have been set up on the system.

The following diagram shows the SFANet deployment scenario.

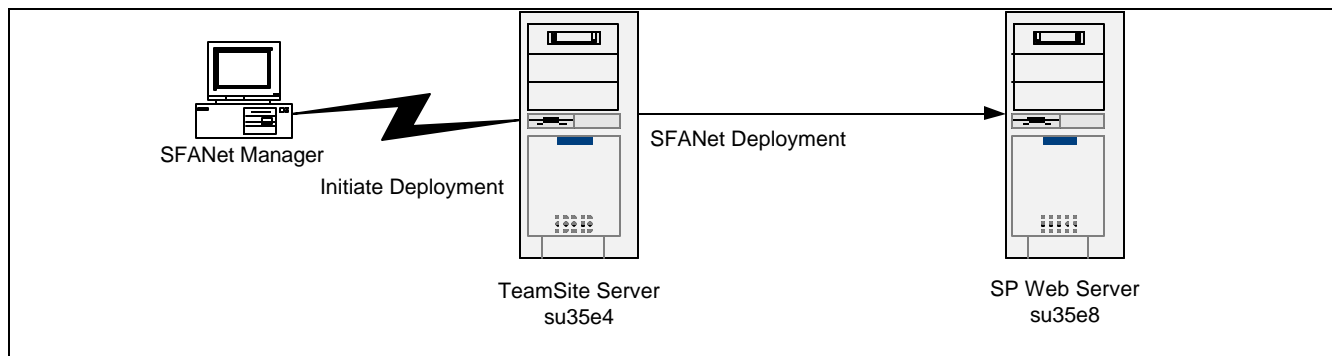


Figure C. SFANet Deployment

The following configuration files have been installed on the TeamSite server, su35e4. Opendeploy configuration files must also reside on the target servers. File location and names are listed in the table below.

Table 6. SFANet Opendeploy Configuration Files

| TeamSite Server Directory | File Name       |
|---------------------------|-----------------|
| /iw-home/opendeploy/conf  | od.int.prod.cfg |
| Target Server Directory   | File Name       |
| /opt/od/conf              | iw.odserver.cfg |